APPOINTMENT STANDARDIZATION PHASE I

A Cookbook Guide to the CHCS MCP CPET Release (APS I)

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PROJECT SUMMARY

- Phase I of Standardized Appointments (APS I release)
  - Supports Standardized (MCP) Appointing process
    - Rename PAS Clerk menu -> Clerk Front Desk Menu & move to MCP menu
    - Remove the PAS BOK option from menus
    - Must use MCP Booking options for appointing
    - Users need to have the CPZ CCP security key to access MCP appointing options
  - Creates Standard Appointment Types (in Appointment Type file)
    - (PCM, PCM$, …)
  - Creates Appointment Detail Codes file
    - (PE=Physical Exam, INJECT=Shot only, …)
    - MCP Booking options will not utilize Appointment Detail Codes until Phase II
    - Sites should start considering how they will combine standard appointment types and appointment detail codes in their schedules and templates after they receive Phase II.
    - Sites may add new appointment detail codes, but new codes should be standardized at the regional level prior to adding them.

SITE PREPARATION

- Ensure MCP File & Table build has been completed
- Ensure users have been trained in MCP
- Make MCP Computer Based Training (CBT) I & II available to all users on the Web or CD-ROM and test users for comprehension.
- Determine users who need PAS BOK option assigned as a secondary menu and make those assignments in advance of APS I. TMA Guidance is that PAS BOK should only be assigned to users who book appointments for dental and for Self-Referral clinics, such as Optometry.

SITE PREPARATION (cont)

- Users with the Clerk Scheduling Menu as a Primary Menu will now have Clerk Front Desk Functions as their Primary Menu.
- Assign users the CDSK as a secondary menu option instead of the broader CPZ CCP security key.
- Site-defined additional menu options on the Clerk Scheduling Menu will need to be added to the Clerk Front Desk Functions Menu after APS I is loaded.
- Become familiar with the guidelines and materials on the TRICARE Access Imperatives web site:
  http://www.tricare.osd.mil/tai/

CHANGES FOR USERS
MCP Appointing

- Sites will need to use MCP to book appointments
- Path: CA>PAS>MAN

```
      HMCP   Health Care Finder Menu
      CDSK   Clerk Front Desk Functions Menu
      EMCP   Enrollment Processing Menu
      DMCP   Display Patient Appointments
      CMCP   Cancellation by Patient
      OMCP   Outputs & Management Reports Menu
      RMCP   Registration Menu
      BMCP   Batch PCM Reassignment Menu
      IMCP   Interactive NAS Processing Menu
      PMCP   Provider Network Management Menu
      FMCP   File/Table for MCP Menu
      AMCP   Ad Hoc Report Menu

   Select Managed Care Program Menu Option:
```

CHANGES FOR USERS
MCP Appointing

- Sites will need to use MCP Health Care Finder Appointing
- Path: CA>PAS>MAN>HMCP

```
        AHCF   Appointment Order Processing
        BHCF   Health Care Finder Booking
        EHCF   Enter Appointment Refusals
        CHCF   Cancellation by Patient
        OHCF   Output Products
        RHCF   Health Care Finder Reports Menu
        LHCF   Print Patient Address Label
        EENR   Enrollment Enter/Edit

    Select Health Care Finder Menu Option:
```

Use this option to book

CHANGES FOR USERS

- Sites will need to use the Clerk Front Desk Functions (CDSK) menu instead of the PAS Clerk menu
- The CDSK menu will not contain the PAS BOK option
- Menu Path: CA>PAS>MAN>CDSK

```
        USV    Unscheduled Visit (Walk-In, Tel-Con, S-Call)
        CBP    Cancellation by Patient
        DPA    Display Patient Appointments
        IPC    Individual Patient Check-In
        MCD    Multiple Check-In by Default
        EOD    End-of-Day Processing/Editing
        VAP    Ambulatory Procedure Visits Menu
        SDP    Single Patient Diagnoses/Procedures Enter/Edit
        NOT    Notify Patients Menu (Cancel, No-Show, Wait List)
        WLR    Wait List Requests
        RDM    Registration & DEERS Menu
        ORM    Operational Reports Menu
        TRM    Track & Request Medical Records Menu

    Select Clerk Front Desk Functions Menu Option:
```

USING STANDARD APPOINTMENT TYPES

- Update templates and schedules to use the new standard appointment types
- Update slot comments with the one or several detail codes as free text. Detail codes define care and resources needed for the appointment.
- Update ADS to map the new appointment types to the encounter forms.

NEW DETAIL CODES

- Sites should add the following standard Patient Access detail codes to the Detail Code file after APS I is installed. These codes will be used to reserve appointments for the specified type of beneficiary.
  - BPAD Active Duty Only
  - BPPR Prime Only
  - BPGME Graduate Medical Education
  - BPNAD No Active Duty
  - BPNPR No Prime
  - BPNAP No Active Duty, No Prime
  - BPSP Special Projects

NEW DETAIL CODES (continued)

- Sites may create new detail codes after APS I installation provided they are approved by the Lead Agent.
- Detail codes will usually be created for special clinical care required on an interim basis and not covered by a hospital location.
- Determine whether care should be defined by an existing/new hospital location or by a detail code.
- Detail codes should not duplicate existing clinic names (hospital locations) at the MTF.

NEW DETAIL CODES (continued)

- Sites should first coordinate new detail codes internally.
- An Access Standards Manager should be assigned to manage appointing standards.
- Lead Agents from all Regions will coordinate new detail codes with the TMA Appointment Standardization Program Manager.
- New detail codes approved by the Lead Agent and TMA will be used throughout the region.
- Approved detail codes will be published on the TRICARE Access Imperatives web page.

PROPOSED NEW DETAIL CODES

- When Web-based appointing is implemented, the following detail codes are proposed to be used to reserve MTF appointments for the web.
  - WEO - Web-based Appointment only
  - WEA - Available to Web-based and MTF to book

NON-COUNT APPOINTMENTS
Short Term Solutions

- Short Term options to designate Non-Count appointments (select one)
  - For clinics with all non-count appointments, create a hospital location for the clinic. Set the Clinic Profile Workload indicator to non-count. Name appropriately. Assign the clinic to providers. Schedule all non-count appointments in that location.
  - For clinics with mixed count and non-count appointments, use a standard appointment type with the non-count extender,"X", to indicate a non-count appointment, e.g. PCMX, ROUTX, SPECX, etc.

NON-COUNT APPOINTMENTS
Long Term Solutions

- Long Term solution to designate Non-Count appointments:
  - A user with the appropriate security key will be able to indicate in the clinic/provider schedule whether each appointment slot is count or non-count. Each slot will default to count.
  - The temporary non-count appointment types will be inactivated, e.g. PCMX, ROUTX, etc.

BOOKING ANCILLARY AND DENTAL APPOINTMENTS

- Some sites will not convert to the new nine appointment types for dental and ancillary care. They may be allowed to book using PAS as a secondary menu option with their own appointment types. The new Medical flag will be set to NO.
- Other sites are booking all dental appointments using the MCP Referral Booking module and the standard appointment types. They are creating referrals for each appointment as required. These sites will be able to track access standards for dental care.

SPECIAL CONSIDERATIONS

- MCP will require the use of Referral Booking to book a Prime patient for Primary Care to a provider who is not a PCM Group member or to a place of care other than a PCM Group Member's assigned place of care.
- ADS bubble sheets must be changed to work with the nine appointment types. Inclusion of detail codes in ADS is being reviewed for a possible future enhancement.
- The slot comment field may be used in the short term to enter detail codes as free text. They will be displayed in the slot comment field on the MCP available appointment list during booking.

REGIONAL AND LOCAL STAFF ROLES

- The Lead Agent will be responsible for coordinating site defined detail codes across the region.
- The Lead Agent will monitor the use of all standard data elements, and of standard and recommended clinic names. Clinic names that are not included in the standard or recommended name sets should be standardized at the regional level.

NEED MORE INFORMATION?

- The TRICARE Access Imperatives web page can be found at http://www.tricare.osd.mil/tai/. The web page contains all the documentation and policy related to Appointment Standardization.
- An MCP Advanced Computer Based Training (CBT) course is being prepared by the government. The CBT will be available on the web and on CD ROM. The CBT will demonstrate how to book appointments in the MCP Healthcare Finder module and to build schedules and templates.
- An APS I version will be available in November 2000. An APS II version will be available TBD.